Printing a form in Quicken

You can print any of the forms you might need to send to a customer or vendor, including invoices, estimates, credit memos, bills, and more. In addition, you can adjust the printer to print forms suitable for use with the Quicken double-windowed envelopes, and you can print on preprinted letterhead. If you're printing invoices, you can print several at one time.

Click the topic below for the item you want more information about.

Print a form to paper or PDF

1. Display the form (estimate, invoice, or credit) you want to print.
   - **Tell me more**
     You can print an invoice from the dialog where you created it, or use the **Print Invoices** dialog to print a batch of forms.
2. Click **Print**.
3. Select any options that you want to use; for example, you can specify the font or the orientation of the document.
   - **Can I make global changes to my default print settings?**
     Yes. To modify global print settings for forms, choose **File** menu > **Printer Setup** > **For Printing Invoices**. Quicken displays the printer setup dialog for invoices.
4. Click **OK** to print.
5. If you're printing to a PDF, enter a name for the PDF when Quicken requests this information, navigate to where you want to save the PDF, and click **Save**.

Print a form to use with Quicken's double-window envelopes

1. Choose **File** menu > **Printer Setup** > For **Printing Invoices**.
2. In the **Printer** list, select the printer you want to use.
   - Select Quicken PDF Printer to print to a PDF.
   - Select another printer to print to paper.
3. To change the margins (top, bottom, left, right), enter different margin sizes.
4. Click **Company Font** if you need to adjust the font in the company address section of the layout so the appropriate information shows through when you fold the form and place it in a Quicken double-window envelope. (Optional)
5. Click **OK** to print.
6. If you're printing to a PDF, enter a name for the PDF when Quicken requests this information, navigate to where you want to save the PDF, and click **Save**.

Notes

To ensure that your company address and the customer addresses show correctly in Quicken's double-window envelopes, fold the form on the line that runs along the top of the Due Date and P.O. Number fields. (To order envelopes from Quicken, choose **Tools** menu > **Write and Print Checks** > **Order Checks** (**Cheques** in Canada).

- **Print a batch of invoices**
  1. If you're printing to paper, make sure your printer is online and contains paper.
  2. Click the **Business** tab, then click the **Business Tools** and choose **Print Invoices/Invoices List**.
  3. If you have more than one account, in the **Select account** list, select the account from which you want to print invoices.
  4. Click the invoices you want to print (check marks appear). (Optional)
     - **Tell me more**
       If you don't want to print an invoice that's marked with a check mark, click in the Print column next to the invoice to clear the check mark.
  5. Click **Print**, and then select **List** or **Selected Invoice**s.
  6. In the **Printer** list, select the printer you want to use:
     - Select Quicken PDF Printer to print to a PDF.
     - Select another printer to print to paper.
  7. Click **OK** to start printing.
  8. If you're printing to a PDF, enter a name for the PDF when Quicken requests this information, navigate to where you want to save the PDF, and click **Save**.
- **Print a form on preprinted letterhead**
  1. Choose **File** menu > **Printer Setup** > For **Printing Invoices**.
  2. In the **Printer** list, select the printer you want to use.
     - Select Quicken PDF Printer to print to a PDF.
     - Select another printer to print to paper.
  3. Change the top margin to allow enough space for the information on your letterhead to print without overlapping any information on the form.
     - **Tell me more**
       You may have to adjust the top margin a few times before you're satisfied with the way the form prints on your letterhead. To avoid wasting letterhead stock while you're testing the different margin settings, try printing on plain paper and then superimpose the plain sheet over a sheet of your letterhead to see how it looks.
  4. Click **OK**.
- **Reprint invoices I've already printed**
  If you print an invoice to paper, by default it no longer appears in the Print Invoice dialog. You can display it again so you can reprint it.

  1. Click the **Business** tab, then click the **Business Tools** and choose **Print Invoices/Invoices List**.
  2. If you have more than one account, in the **Select account** list, select the account from which you want to print invoices.
  3. Click **Options**, and then select **Show All Invoices**.
  4. To reprint the invoice, select it and print as usual.

Notes

You can print envelopes and labels for your forms from the Address Book.

ⓘ **Note for our Canadian Customers**

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"

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